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ABSTRACT

This publication is intended to help improve the educational planning and evaluation practices of the several hundred small- to medium-sized Wisconsin school districts that do not have a centralized planning staff. Although it was prepared specifically for school districts in Wisconsin, its content is just as useful and applicable to districts in other states. Separate sections of the booklet discuss the purposes and expectations of local educational planning, describe several possible approaches to initiating local planning, examine the value of educational needs assessment and its relationship to an overall planning program, present a functional definition of comprehensive planning and describe an educational planning model developed by the Wisconsin Section for Educational Planning, and present an analysis of the Wisconsin planning model. (JG)

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An Introductory Planning Guide For Local School Districts

A Product of the Section for Educational Planning

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Preface

Local school district personnel throughout Wisconsin have demonstrated a serious interest in recent years in improving educational programs and administrative and management practices through more comprehensive, coordinated local planning and evaluation capabilities. They have also indicated there is a lack of basic, fundamental materials for the several hundred small to medium size enrollment districts which do not have centralized planning staff and are not likely to be able to employ such staff in the foreseeable future.

It is the intent of the Section for Educational Planning to produce additional planning publications which will move beyond this preliminary product and provide more specific information, procedures, and materials regarding various components of the total planning model and process.

Currently it is anticipated that LEA guides regarding such subjects as philosophy/goals/objectives development; needs assessment; and the selection, implementation, and evaluation of alternative strategies may be produced as part of this series of planning publications.

Your reactions to this initial effort and your suggestions for additional publications which would be of practical value to you would be appreciated.

Tom Stefonek, Chief
Section for Educational Planning

I. Introduction And Rationale

The concept and practice of educational planning at the local school district level are not ideas and actions that are unique to the 1970's. Local district planning has existed since school districts were first created in Wisconsin during the territorial period of the state. Changes since those early days have been accommodated by local planning efforts of varying degrees and quality. Now, in the mid-1970's the state's public K-12 system reflects a high level of public support and confidence, and includes higher quality personnel and better educational programs than at any previous time. This public support and confidence in local educational efforts is the result of a great deal of planning by innumerable teachers, board members, administrators and concerned citizens.

While these efforts and their results are substantial and impressive, those who have been the most involved in them are among the first to recognize that during the 1970's new factors and forces have emerged which make more and better planning even more imperative than in the past.

The following items are offered without extensive definition or discussion as evidence of this continued and expanded need because they are already well recognized and understood by teachers, school board members, administrators and concerned citizens in districts throughout Wisconsin:

1. Public expectations and demands for improved managerial/instructional effectiveness and accountability, as well as continuation of existing demands for fiscal responsibility and efficiency.

2. A stabilizing enrollment base, or often a declining base, in many local districts, with attendant implications and problems regarding facilities, programs, staff and expenditures.

3. A leveling off of financial support of the educational system after a generation of expenditure levels which have out-distanced growth in many other public service areas.

4. New role and power relationships among teachers, school boards, and administrators which require new strategies and techniques to cope with complex and sophisticated issues, problems and needs.

5. Increased state-level demands and expectations as evidenced by the 13 local district standards enacted in Chap. 90 in 1973, and by the Special Educational Needs (SEN) Program initiated that same year.

6. New state-level and public expectations that all children will be provided appropriate educational opportunities as evidenced by Chap. 89, also enacted in 1973. Chap. 89 stands as landmark legislation for the education of handicapped children and has numerous and complex implications for every local district, regardless of enrollment size or physical location.

7. Increased complexity of the teaching-learning process due to a spectrum of new programs, techniques, materials and concepts which can overwhelm the time of the most conscientious student of the art and science of education by their numbers and time consumption, as well as increasing sophistication.

8. Demands and expectations for improved vocational and technical education in the secondary schools; for career education throughout the K-12 curriculum; and for new strategies to provide appropriate programs for gifted students.

9. Continuing and restructured federal educational programs which often require disproportionate amounts of time and effort to be effectively and efficiently administered and coordinated with local priorities, needs, and programs.

10. An end to the period of intensive school district consolidation and reorganization which has existed for the past 20 years, and a new realization that the number, size, and types of districts now in existence will probably be the basic K-12 educational system that must serve the citizens of Wisconsin through the 1970's and 1980's.

This list, while not intended to be exhaustive, indicates there is little time to rest on the improvements and accomplishments of the past, as noteworthy as they have been. There is no shortage of new challenges, needs, and opportunities to be addressed by improved and expanded local district planning efforts and capabilities.

II. Purposes And Expectations Of A Local Planning Capability

While much has been accomplished through local planning efforts, it is evident that much still remains to be done. It is also evident to a considerable degree that local planning has often consisted of temporary, uncoordinated efforts which have been directed toward specific and immediate problems or crises. Few districts have developed a coordinated, comprehensive, sustained planning capability and process which gives a sense of direction and priority to the numerous expectations and needs which are found in every local unit. There are many reasons which could be cited as to why this has not been done, and many are serious and valid explanations. Without attempting to explain the past, but rather building on those achievements and experiences, it appears clear that more must be done to plan more effectively now and to assure the continuation and refinement of the planning process in the future to a greater degree than it has existed in the past.

The planning process, and those responsible for planning, are concerned with at least three major tasks in a school district:

1. The development of goals to describe the primary expectations and responsibilities of the local district and the development of plans to achieve stated goals.

2. The procurement, direction, organization and coordination of resources and activities relevant to the implementation of plans.

3. The monitoring and controlling of the performance of the educational system to maintain and describe progress toward goal attainment, or to intercede with appropriate corrective measures if acceptable progress is not evident.

While these three overriding responsibilities can become obscured by the multitude and variety of programs, problems and conditions with which administrators and school boards have to contend, they do constitute the essence of the management function. Subsequent activities should be analyzed frequently to assure that all three major tasks are being addressed in appropriate ways and reasonable intensity.

An improved, continuous planning capability has the potential to serve local interests in the following ways:

- Educational goals and objectives can be established.
- Community support and student motivation can be increased.
- Present levels of accomplishment can be examined.
- Needs can be more thoroughly identified, documented, and analyzed.
- Resources can be expended more wisely and with better rationale.
- There can be better identification of the results for which the school system is being held accountable.

Planning efforts and activities are not automatically successful in every school district. Several conditions conducive to the establishment of a commitment to better planning are listed below:

1. Those persons involved in and/or affected by the planning process must be convinced that the purpose of planning is to bring improvement through orderly change. Planning and change must not be viewed as threatening or negative entities.

2. Change will occur more easily and more effectively if it furthers the rational self-interests of those affected; if it is compatible with personal values and enhances personal relationships; and if it is supported and backed by legitimate authority.

3. There must be an orientation toward the future, and toward a future which will very likely be different than the past or the present. Thinking, in most cases, should be oriented toward a period of two to ten years in the future.

4. The school system should be viewed as a whole. While recognition and consideration must be given to the interrelated components or elements of the system, the perspective employed should not be so restricted or limited that it ignores the variables critical to the entire system which must be identified, measured, and evaluated.

5. Unrealistic expectations regarding a more formalized, sustained planning effort should be discarded early in the process. Planning is not a panacea. It requires an experimental attitude, the willingness to take reasonable risks, and maturity and patience commensurate with the formidable task which is being initiated. Two to five years has been used as an estimate of the time required for school districts to develop a planning capability and to see the benefits of the process.

Anticipated changes as the result of a sustained, effective planning process may include the following:

- Clarification of the decision-making process, and perhaps modification of that process to involve appropriate people at the appropriate time and place.
- Changes in specific educational programs based on anticipated problems, validated needs, and evaluation of the current status.
- Increased understanding of the purposes, goals, and objectives throughout the school system and recognition of the different opinions, ideas, and strategies by which people feel they may be attained.
- Improved rationale and justification for decisions reached and the possible reordering of priorities and reallocation of limited resources.

Educational practitioners can readily recognize that planning is an intellectually demanding, time-consuming, frustrating and never-ending process. *Planning* internally, however, is more acceptable to most educators and lay citizens than being *planned* for by external agencies.

III. A Planning Definition And Selected Models

Virtually every management or administrative function can be described by a number of definitions, all of which are valid from the particular perspective used. When school districts elect to reorganize and formalize a planning process, those persons involved in the process should understand and be able to describe what is meant by the term "comprehensive planning".

While no one definition may please everyone and serve all purposes, and while no one definition is necessarily more correct than many others also available, it is useful to define a term as well as possible and then use it consistently. The definition used in this guide, as adopted and used by the Section for Educational Planning, is as follows:

Comprehensive Planning Is The Process
of Preparing Sets of Decisions
For Action In The Future
Directed At Achieving Goals By Optimum Means

This definition recognizes planning as a *process*, i.e., an on-going activity to assist decision-makers in determining educational policy. It is concerned with decisions and the inter-relationship of decisions, and is *future-oriented. Goal attainment* is the ultimate purpose of planning as defined above, and there is recognition that *effectiveness* and *efficiency* are primary considerations in determining or selecting the "optimum means."

Several additional definitions are presented below to provide districts an opportunity to select one which best serves local purposes.

Comprehensive planning is the identification or selection of the overall long-range goals of the organization, and the analysis of various possible courses of action in terms of relative costs and accomplishments or benefits for the purpose of aiding the decision-making process in the selection of action.

Comprehensive planning is a process for producing useful information and for goal setting; producing viable courses of action; setting priorities; selecting from among alternatives; implementing selected alternatives; and evaluating and adjusting the organization.

Comprehensive planning consists of analyzing ends (purposes, goals), analyzing means, analyzing costs, and designing evaluation systems.

Planning models are also available in abundance. They are basically intended to depict a series of potentially complex concepts, relationships, and activities in a simple and direct manner.

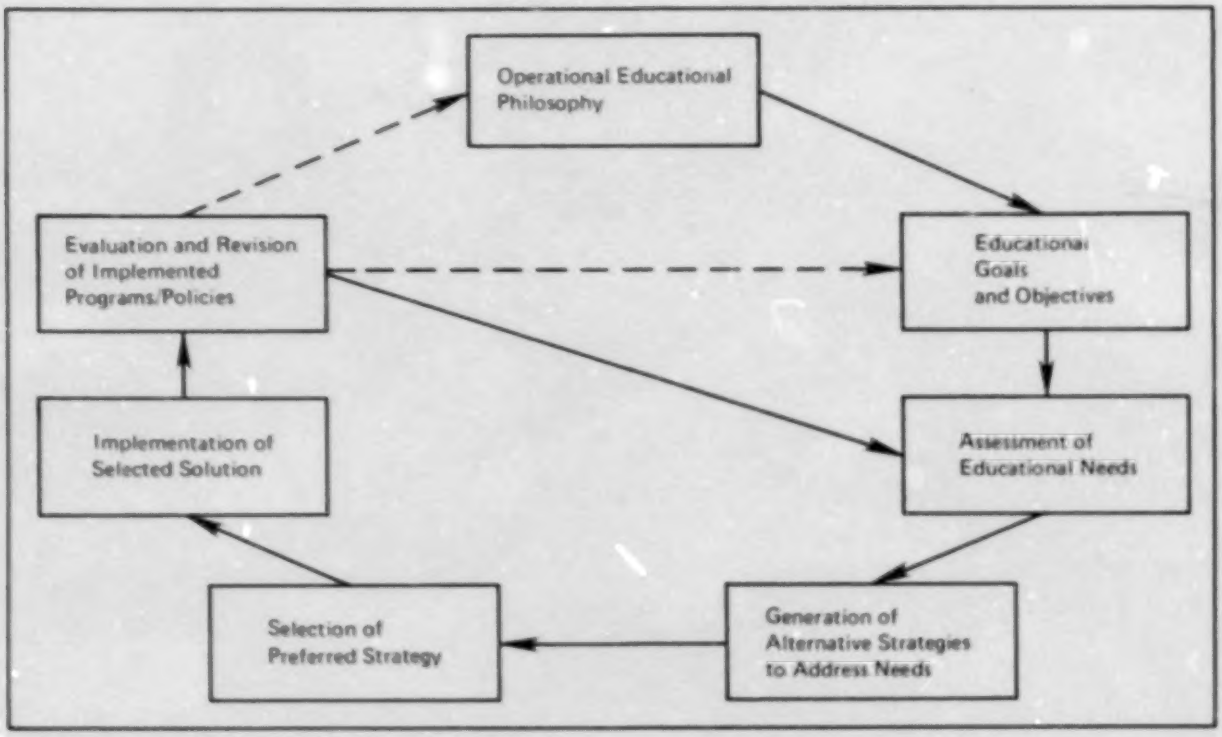
The model presented below has been selected by the Section for Educational Planning and could be labeled the "eclectic model" because it borrows generously from a variety of others.

This model is based on the following assumptions and concepts:

1. Our *values* determine much of what we do and how we do it, both in our personal lives and our educational systems. Many things which we do, or don't do, are not based on cold, calculating logic, effectiveness, or efficiency, but rather are tempered and influenced by underlying attitudes, principles, and beliefs. Children might learn to read "better" for example if food was withheld each day until desired reading proficiency was demonstrated. Our values regarding physical well-being, absence of trauma, positive attitudes toward school and reading, recognition of individual differences, and a caring attitude toward others prevent such drastic action, however.

Differences over what is "right" or "best" are often rooted in different value systems which place greater or lesser importance on the subject being debated or decided upon. Which is the "better" expenditure for example – $10,000 for new audio-visual equipment for 1000 pupils, or $10,000 for new band instruments for 100 pupils, or $10,000 to hire one new teacher to work with 10 mentally retarded pupils? Values are not verifiable statistically or measurable quantitatively in most instances, but rather relate back to basic beliefs about the quality of human life and the relationships among persons.

This model recognizes commonly held values, as expressed in an educational philosophy, as being a basic, underlying factor of great importance throughout the planning model and process.


Operational Educational Philosophy
Evaluation and Revision of Implemented Programs/Policies
Educational Goals and Objectives
Implementation of Selected Solution
Assessment of Educational Needs
Selection of Preferred Strategy
Generation of Alternative Strategies to Address Needs

2. Educational goals and objectives can be and should be articulated in each school district, as an extension of values and philosophy, into more operational, measurable terms. While district level goals may be of a different order and degree than instructional objectives in a 9th grade biology class, there is a need for both to exist and a need for planning to occur at both these levels, as well as at other intermediate levels within the organizational structure.

3. Needs assessment is basically a discrepancy analysis, i.e., the difference between *what is* and *what is desired*. Looking at what we now have, in consideration of what we said we wanted, is a reasonable way to work toward change in the future.

4. Alternative ways may exist to reach the same goal. One of the important contributions of the planning process is to identify alternative strategies and to analyze, evaluate, and interpret them in full recognition of the values, goals, constraints, resources and circumstances that exist in the local school system and the community it serves. If predetermined standardized solutions were known for all educational problems and needs there would be little need for much of the planning process to exist.

5. Unless something happens beyond the development of goals, assessment of needs, and selection of a preferred strategy, little positive change can be claimed for the whole process. Implementation must be recognized early in the planning process as a very real eventuality and if this commitment to possible action doesn't exist, there may be discouragement and disillusion among those who have worked to prepare for change.

6. Few selected solutions are total and permanent. New pupils, new community expectations, new societal values, and new circumstances may make even the most promising and most effective solutions imperfect and obsolete with the passage of time. Evaluation, revision, and additional change in the future are the inevitable fate of all innovations and realistic planners will look for progress, not permanent perfection.

The purpose of a definition is to communicate meaning and the purpose of a model is to depict some aspects or degree of reality, usually in simplified form. The definition and conceptual model of planning described above are intended to aid in the development of a planning attitude and perspective, which are necessary prerequisites for the development of a planning capability at the local district level.

IV. Initiating A Planning Capability

A district administrator may be in general agreement with most of the preceding material and yet be faced with the realistic problem of getting something positive started in the district. Several possible beginning points are suggested below:

A Self-Analysis of Present Planning Practices
Every district plans to some degree in some way at the present time. It would be helpful to reflect upon these formal or informal processes; the participants in the local efforts; kinds or types of past or current planning applications that can be identified; and the degrees of success or failure, and the process or products, that have resulted. A brief documentation of these considerations and related areas can serve as a basic vehicle for recognizing and describing the present state of the art locally and communicating it to others.

Identification of Potential Planning Functions and Activities
Those who may be asked to support, authorize, or participate in the development of a local planning capability can legitimately ask what the purposes, functions, and activities may be which will be undertaken in the name of planning. If, as indicated previously, there exists a lengthy list of demands, needs, and expectations which local districts must contend with and respond to, a district administrator should be able to identify a variety of problems and issues to be addressed by a planning capability. Development of such a document will give legitimacy and credibility to the exploration of improved planning procedures and will communicate to the school board and others what the chief administrator has in mind when speaking of planning. This list should not be considered prescriptive or final in any sense, but can be used instead to initiate thought and communication regarding improved planning efforts.

Consideration by the Administrative Personnel
Although most Wisconsin districts do not have large central staffs, there is often a small group consisting of administrators, principals, supervisors, coordinators, and perhaps a business manager who can be assembled to discuss the local planning situation. Within a period of several meetings this small, informal group can share perceptions, ideas, and opinions regarding the strengths and weaknesses of the local planning situation, what better planning could do for the district, and the specific areas that could be addressed within the school system. If such discussions can result in some consensus regarding these topics, the administrator is in a stronger position to consider bringing the subject to the attention of the local school board.

Discussions with the District School Board
If a district administrator perceives a deficiency in the local planning process there are few starting points more logical or obvious then discussing the subject thoroughly with the local school board. Such deliberations should not, if possible, be conducted during a regular board meeting which often has more agenda items scheduled than can be properly considered under the best of conditions. If it is recognized that planning is a basic management function that permeates all areas of the district's operations, hopefully board members will be willing to schedule a special meeting, or reserve a regular meeting, during which the topic can be adequately discussed.

This type of discussion is usually desirable because it provides early and direct information to the board, and provides the administrator with an indication of the board's interest, concern, receptivity, and support related to the subject of improved local planning.

Formation of A Local Planning Council

Even if district management personnel recognize the need for more and better planning, few districts can afford to employ additional specialized staff to work as planning coordinators or directors. More likely existing personnel will have to be utilized to provide such services.

It is possible in most districts to form a local planning council typically consisting of the superintendent, key central office personnel, principals or representative principals, representative teachers, a member(s) of the board of education, and a representative(s) of the community at large. Usually teams consisting of ten to fifteen members provide adequate representation in most small and medium size districts and are still small enough to function effectively. While the planning council cannot do all the planning, they will probably do

an important part of it, and they will be expected to lead others through the planning process, and to initiate, carry on, and complete specific planning activities.

During the formative stage, the administration, school board, and planning council will have to consider some of the following types of questions:

1. Will appointments to the planning council be permanent, or in the case particularly of teachers, board members, and/or community representatives, will there be some specified period of membership and some change in representation?

2. What will be the schedule of meetings and who will provide basic input to the group to guide and direct them?

3. Will these new duties be "add-ons" for all members or will released time and/or financial incentives be allowed in some instances?

4. How will the group arrive at major decisions – by concensus, by majority vote, by compromise, or by final judgment of the superintendent?

5. What will be the relationship of the planning council to the board of education and how will opportunity be provided for regular interaction and input between the two groups?

6. What are reasonable expectations regarding the processes and products to be developed by the planning council and how will other appropriate persons be involved at the proper times?

7. How will the council provide for its own organization and proceedings?

These kinds of questions should be considered early so the planning council has some assurance of legitimacy, permanence, influence, and efficiency of operation. Without adequate thought and preparation the planning council, after an initial burst of energy and enthusiasm, can quickly become another stagnant committee which exists officially, but in fact does little it was designed to do.

In most districts, the continued support and involvement of the superintendent is also a key factor to the success of the team. If planning council meetings and activities become a low priority to the superintendent, the committee usually begins to display the same attitude, and within a short time morale problems and a sense of unimportance render the group ineffective.

It is equally true that the board of education must provide for and regard the planning council as a primary advisory group. Although no advance guarantees can be made regarding eventual actions by the board related to the suggestions, recommendations, and products of the planning council, both groups must view the relationship as a serious and continuous arrangement if the results are to merit the efforts.

V. Needs Assessment: A Common Starting Point

Many local administrators and school board members have the desire to "get organized" and to begin development of a better planning capability but are uncertain as to where and how to begin. For a number of Wisconsin districts during the past several years, a local educational needs assessment has provided a solid starting point for the following reasons:

- Routine activities and operations of the schools can be re-examined and re-evaluated from the perspective of the entire community.
- Priority educational needs can be identified and documented to serve as the basis for action designed to improve the educational program.
- Existing educational philosophy and goals can be reconsidered as a part of the process or in light of the results.
- District educators can demonstrate their concern and responsibility for the constant evaluation and improvement of the local school system.
- Community residents can be provided with the opportunity to participate in the development of educational plans and policies which affect them and their children.
- An important public relations function can be served during the needs assessment study.
- Resulting statements of goals, objectives, desired improvements and changes, become the basis for sound planning through management by objectives, PPBS or other selected systems.
- The resultant data base can serve a variety of program and project planning activities in the district and can aid in allocating resources.

The development of the needs assessment program occurred through efforts of local school districts, CESAs, and the State Department of Public Instruction which were directed at attempting to provide a better basis for educational planning. Resource materials have been accumulated which represent some of the ideas, suggestions, alternatives, and a general history of the LEA, CESA, and SEA activity in conducting needs assessment. Hopefully, the general guidelines and directions available in resource material packets can provide a basis for any educational community to construct a viable model and organization to pursue their own needs assessment. As more and more educational communities proceed thru needs assessment, improvements and modifications of the resource materials occur, and as a result those who review these documents should be aware that they represent only a point in time and not the ultimate answers.

In a survey of local districts during May 1974, over 80 districts indicated some degree of interest in conducting local needs assessments during the 1974-75 school year. Materials, staff training services and consultative assistance are available to all districts free of charge from the Section for Educational Planning of the DPI, 126 Langdon Street, Madison, WI 53702.

As an aid to understanding needs assessment, a number of fundamental concepts and activities are listed for the reader's consideration:

1. A local educational needs assessment is a planned, organized, coordinated comprehensive self-analysis and self-evaluation of a local school district by members of the community, faculty, administration, school board, and student body.

2. The ultimate purpose and utility of the local needs assessment is to provide a more accurate, more complete, and more accessible data base for better understanding and for improved decision-making.

3. Local needs assessment should be the result of interest at the local level directed toward the improvement of education in the local schools and requires sufficient thought, preparation and commitment.

4. Needs assessments are usually structured and organized on the basis of research activities, such as community surveys, public concerns conferences, pupil and faculty speak-ups, and the analysis of pupil performance data and administrative data available in the district.

5. Needs assessments usually include collection of both objective data and subjective data. Attitudes, values, expectations and opinions held by the groups and individuals involved are often equally as important as more objective data.

6. Needs assessments usually address components of local district operations such as curriculum, transportation, facilities, pupil services, support services, policies and procedures. Although most needs assessments are directed at determination of a broad profile, the particular issues and interests of each district should be the major criteria for deciding upon the approach and structure of the study.

7. A full school year is recognized as an adequate time frame within which the planning, implementation, analysis, and results of a needs assessment study can be completed.

8. Costs vary according to the design of the study and the size of the district, but generally, the data processing costs of analysis for recent LEA studies has been under $300.

9. Needs assessments are intended to objectively identify strengths and assets as well as needs. A carefully completed needs assessment develops a community profile regarding level of support for various aspects of local district operation.

10. Needs assessment embraces the concept that educational communities should frequently evaluate local educational efforts in terms of the goals and objectives they want to achieve.

The Department of Public Instruction recognizes the kinds of planning, budgetry, and analytical restraints most school districts operate under, and has developed the resource materials, processes, and consultation involved with needs assessment to overcome these difficulties. If further information is desired, contact the Section for Educational Planning of the Division for Management and Planning Services at 608 266 7798 or 608 266 2146.

While it may be debated as to whether a needs assessment is the most logical place to begin the planning process, or whether the development of a district philosophy, educational goals and instructional objectives should be the initial activities, many districts favor the needs assessment approach for the following reasons:

1. It aids philosophy, goals, and objectives development because it makes public and professional opinions, values, attitudes, and expectations available to aid in such development.

2. It causes public involvement and awareness of the planning process and educational needs and can generate support for planned change based on documented deficiencies and expectations.

3. Current programs, services, and policies reflect district philosophies, goals, and objectives to some degree even though these may not all be well described and documented in a formal manner. The needs assessment therefore is not operating in a vacuum but is instead serving to evaluate what is now, and to learn what should be in the future.

4. Needs assessments are product-oriented, and related activities are conducted within a definite time frame to give the direction, structure, and purpose which is essential when many lay citizens are involved.

5. The product(s) of the needs assessment provide excellent input for further work by the local planning council and thereby strengthens that group and their role by making their work relevant and visible.

The needs assessment model used by the DPI is based on the "Worldwide model" developed by Dr. Jefferson Eastmond of Salt Lake City, Utah. It has been "Wisconsinized" considerably during the past several years, however, to meet the local conditions, requirements and preferences expressed by many local district users. It is anticipated that the materials currently in use, and those developed in the near future, will be incorporated into an LEA needs assessment guide for distribution to all districts during the summer of 1976.

Additional models are available, including the Dallas, Texas model, the Phi Delta Kappa model, and the Fresno, California model. Information regarding these processes are also available on request from the Department of Public Instruction to enable local districts to draw ideas and techniques from them to develop the specific customized process that best serves individual district preferences and conditions.

VI. Other Possible Starting Points

In some districts, for a variety of good reasons, a widespread community based needs assessment may not be a logical or acceptable starting point. Several alternative beginning activities are therefore suggested below for local district consideration.

Development of a Local Educational Philosophy

An educational philosophy at the school district level is a summary statement of the beliefs, concepts and attitudes which underlie and support the local educational system. It is an expression of the public values and expectations which give purpose, direction and meaning to the myriad activities, programs and events which comprise an effective and efficient school system. It is a rationale for existence, a statement of the reason for being of a school system, and in a general sense, it can aid in setting priorities; in choosing from among alternative courses of action; in determining directions of change and movement; in assessing and evaluating what is; and in deciding what should be.

A district philosophy, when taken seriously, is a living, dynamic statement which permeates all levels and all dimensions of instruction, administration, governance and decision-making. It is a base of reference, an area of commonality, and a meaningful guide for all persons involved in the educational process. Rather than being written and then forgotten, a district philosophy should be a statement with constant utility and influence.

Districts having a written philosophy can begin the planning process by evaluating it in light of new and changing expectations and demands being made of the local school system. A committee of manageable size, which includes appropriate professional, lay, and pupil representation, can develop a tentative philosophy within a period of several weeks to several months. The philosophical statement can then be presented to the total community for consideration, possible revision, and formal adoption.

Districts with no existing written philosophy may develop such a statement for public review and formal adoption through the consideration of philosophies from other districts as well as original developmental work by the committee.

The important step is to decide to undertake the task, for once that commitment is made local personnel can be organized to complete it in an effective manner.

Development of Local Educational Goals

The development and adoption of a district philosophy of education provides a broad context within which the school system functions. Within this framework educational goals can be developed to interpret more specifically the purposes, expectations, and ends toward which the local school system is striving.

Educational goals are relatively broad, timeless statements of intent which express the desirable ends toward which efforts are directed; the achievements or accomplishments desired; and the results to be attained through the educational process.

Goals describe characteristics, conditions, and circumstances which have been judged as good and desirable. They are rooted in values which are collectively shared by those involved in or affected by the local educational system. Goals need not necessarily be viewed as competitive with one another. They can be multiple in number and equal in priority, or they can be ranked in priority order if concensus can be attained.

Well formulated goals can aid in decision-making by allowing decisions to be considered against the backdrop of standards and values expressed in goal statements, and they can serve as broad indicators of intent which provide transition from a broad statement of philosophy to the development of specific instructional objectives.

During the 1972-73 school year, through the involvement of a citizens task force, public hearings, and related activities, a statement of state-level educational goals was developed for the first time in Wisconsin. These 11 major goals, with underlying sub-goals, have been distributed to all local districts and all interested individuals, agencies, and organizations in the state. In addition a composite document containing goals from states throughout the United States has been published by the Department of Public Instruction under

auspices of the Cooperative Accountability Project (CAP) and is available on request from the DPI. Goals have also been developed in some local districts and may be used, as may the state level goals, to initiate and aid in local goal development in any school district.

Professional Staff Identification of Perceived Needs

During the 1973-74 school year a limited approach to issues identification and perceptions of needs was piloted in one school district of approximately 4,000 K-12 pupil enrollment. This process involved school board members, faculty members, principals, and district level administrators working in a three committee structure, assisted by DPI planning personnel and outside consultants employed on a limited basis.

Through nominal grouping techniques, data collection activities, committee deliberations and related procedures, actual and perceived issues, problems and needs were identified, discussed, defined, documented, and analyzed to serve as the basis for continued planning efforts. A report of this pilot project is available upon request from the Section for Educational Planning of the DPI.

This limited approach does not have the widespread public involvement and input of a comprehensive community based needs assessment and therefore may serve as a less certain indicator of local issues, deficiencies, and potential directions. It does have the advantages of being a shorter duration process which is less demanding and more manageable, and of being more dependent upon professional personnel and expertise readily available in the district.

The products of this limited district self-evaluation and analysis may best serve as the input into more detailed needs assessment; as the basis for exploring alternative approaches to address the problems and needs identified; and as a means of generating public and professional awareness and interest regarding district directions.

Interview Study of District Concerns and Problems

A district wanting to make a start at self-appraisal but preferring to do this in a more controlled, in-depth manner can consider the limited sample, interview-type of study. In this approach a number of items are developed by local personnel, with possible assistance by DPI or other consultants. After initial development, field-testing, modification, and finalization the instrument(s) is (are) used as the basis for in-depth interviews with a reasonable number of community residents, board members, teachers, students, and administrators.

While care must be exercised not to generalize the findings and interpretations beyond what the sample characteristics will support, this type of activity can serve to help identify local issues, problems, perceptions, and conditions which can then be considered for more extensive investigation and evaluation.

This type of study is usually very manageable in it's data gathering phase but requires careful attention and considerable time to tabulate and analyse hours of interviews that are usually recorded on tape. Third party researchers should be seriously considered in such studies to assure confidentiality of the data and anonymity of the respondents, if so desired, as well as objective interpretation of the content.

Summary

Two brief statements can be made to conclude this section:

- There is no one place at which all districts must start to develop a planning capability and/or to initiate planning activities. Some techniques are more appropriate in some districts at certain times than others might be, but each district has to carefully consider what it wants to do and why, and then proceed in the light of local factors and conditions.

- Regardless of what type of entry point is selected there must be sustained local effort and commitment related to the planning process if it is to survive and be effective over an extended period of time. Developing a sound philosophy, establishing worthy goals, or conducting a quality needs assessment may all come to very little fruition if no further efforts are made to relate these to programs, personnel, policies, and financial decisions. An isolated burst of enthusiasm and action, without follow up and follow-through efforts, often results in the proverbial reports that gather dust in numerous file cabinets.

VII. Analysis Of The Planning Model

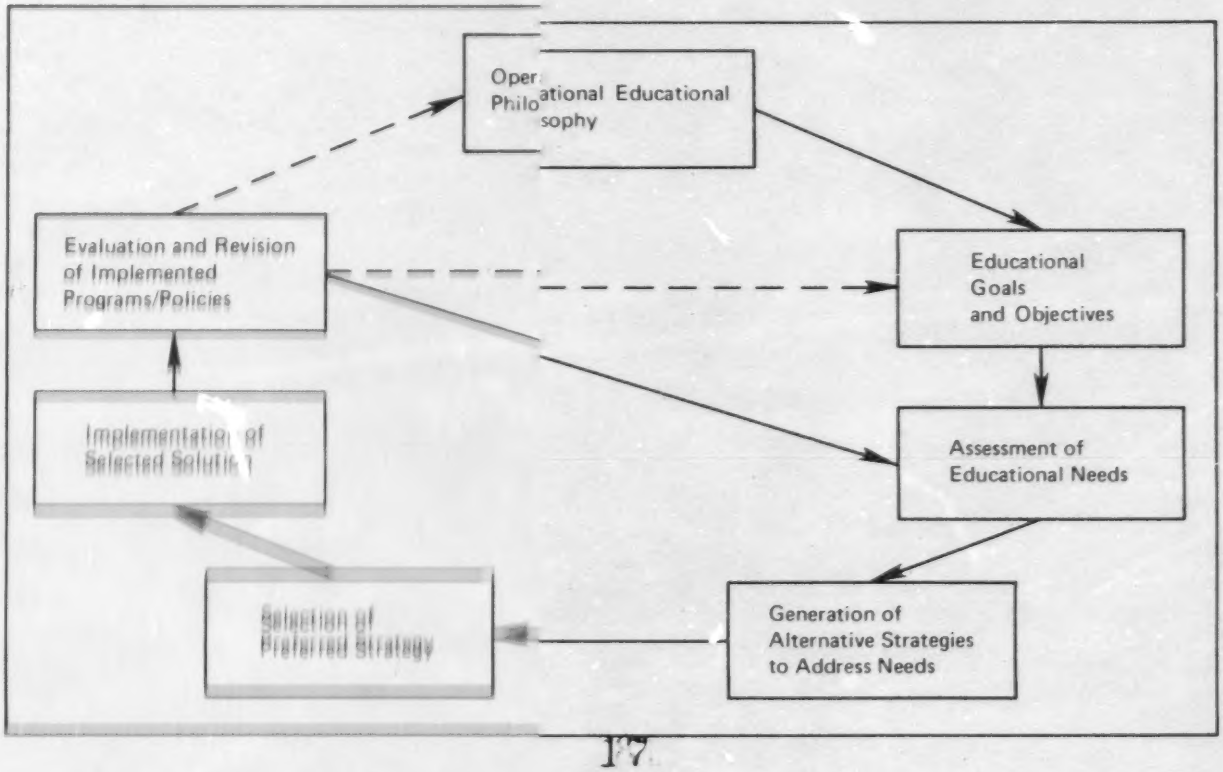
As indicated in Section III, the planning model selected by the Section for Educational Planning, shown below, provides a workable framework for local planning purposes and activities. In this section the components of the model will be more thoroughly analyzed.

Operational Educational Philosophy

The routine, on-going programs, activities and policies of a school district reflect a great deal about the educational philosophy of the community and the school system. While many districts do not have a written, current, formally adopted statement of philosophy, this should not be misinterpreted as the absence of a philosophy. The presence or absence of programs, personnel, facilities, policies, and other related entities speak, in effect, for themselves regarding the philosophy being practiced. As noted previously, philosophies and values are complexly intertwined and form a perspective or viewpoint that colors and influences individual as well as community attitudes regarding the purpose and nature of the educational process and system.

The school district for example that provides kindergarten, a pupil breakfast program, a senior citizens lunch program, a summer school program, an extensive program for the handicapped, a complete co-curricular program, a K-12 career education curriculum, multi-unit elementary schools, special offerings for gifted students, and a work-study program at the secondary level is demonstrating certain values and philosophical beliefs which differ from those held in a district of similar size and wealth which has none or few of these characteristics. While this example is extreme to demonstrate the point, the old adages of action speaking louder than words, and "what you do speaks so loudly that I can't hear what you are saying" help to make the point quite clear.

In many instances a societal philosophy and values have been placed upon the school system through legislative mandates; e.g. the thirteen educational standards, minimum curriculum requirements, and provisions for educating handicapped children. Within these requirements there are many variations, however, both in quantity and quality,


Oper ational Educational
Philo sophy
Evaluation and Revision of Implemented Programs/Policies
Educational Goals and Objectives
Implementation of Selected Solution
Assessment of Educational Needs
Selection of Preferred Strategy
Generation of Alternative Strategies to Address Needs

which are within the discretion of the local board, community, and professional staff.

Updating a dusty, obsolete philosophy of years past, or developing one where none has formally existed, provides an opportunity to consider the nature and direction of the school district and to identify values which are commonly held by the community. Such efforts should result in a statement of belief and intent which serves as a basis for the development of educational goals and objectives.

Educational Goals and Objectives

The past decade has seen an increased interest in goals and objectives from the state capitol to the kindergarten class in the neighborhood school. Many states, including Wisconsin, have developed and adopted formal statements of educational goals and objectives at the state level, and yet some districts have been relatively untouched by I.O.'s (instructional objectives), B.O.'s (behavioral objectives), performance objectives, or M.B.O. (Management By Objectives) or PPBES (Planning Programming Budgeting Evaluation Systems) for administrators and managers.

It is reasonable and appropriate for goals and objectives to exist at several levels within the local school district, and it is also reasonable for these to differ somewhat in nature at these various locations. A statement of district goals, if properly developed, provides the opportunity for all personnel to develop objectives which are compatible with the general statements of intent and the ideal conditions and characteristics which district level goals describe.

Developing acceptable educational goals for a school district is not an insurmountable task and can be accomplished in most districts in a matter of several months. The extension, translation, and interpretation of these goals into meaningful, usually measurable objectives is more complex and time consuming, however, and involves greater effort by the professional staff of the district. Such an effort may require a year or more of involvement by teachers, administrators, consultants, and other appropriate personnel, and may require an additional year for implementation and initial evaluation.

While there are few short cuts to the process, the resultant product should provide an improved description of who is attempting to do what; it should help to clarify expectations and activities; and it should serve as the basis for an evaluation system of greater utility.

Assessing Educational Needs

Needs are often described in relation to perceived problems or undesired conditions and have often been defined as the discrepancy between what is, and what is desired. Section V provides a brief introduction to needs assessment studies in local districts. At this point it is sufficient to emphasize that a quality local effort is time-consuming and involves a great deal of work by many people, but the results have great potential and utility over an extended period of time in many areas of district operation. A community based needs assessment is an expression, by the board of education and the administration, of a belief in the wisdom and judgment of the public and an affirmation of the principle that the public can and should help design the school system that will serve them.

Needs assessment is an effective way to reduce perceptions of problems and deficiencies to more manageable, better defined status. The "problem" of a poor quality elementary reading program, for example, is difficult to address at the level of generalization. If it is learned through investigation that this undesirable state exists in specific elementary schools and/or at specific grade levels which are using particular materials and techniques, the problem assumes new dimensions of clarity. In most cases, such district evidence may not be observable; however in all problem areas some degree of translation and interpretation can be made from a general statement of dissatisfaction to a more clearly defined description of the problem. Such questions as "Who has this problem?", "Where are they located?", "What is the degree of criticality of the situation?", "In whose jurisdiction does the problem reside", and "By what subjective and/or objective evidence do we know this to be a valid description of the problem?", if answered well, help to define the nature of the issue at hand.

Techniques employed to gather subjective and objective data regarding perceptions of problems held by various groups include the following:

1. Community surveys and opinion polls by which expectations, values, perceptions and attitudes held by the public can be collected, analyzed, and interpreted to provide information useful for planning purposes.

2. Teacher and pupil opinion surveys in which those most involved in the educational process from the learners' perspective can provide observations, insights, and informal evaluations of strengths and weaknesses in the educational system.

3. Analysis of pupil performance/measurement data which, in spite of well-advertised deficiencies, can help to identify patterns of pupil performance by groups of pupils over a period of time. Such trends can help to improve an educational program and to aid in identifying and describing specific problems or needs.

4. Community, teacher, and pupil "speak-ups" in which members of these client and consumer groups are provided an opportunity to verbalize their concerns, perceptions, opinions, and values as they relate to the educational system.

5. Summaries of administrative data and evaluations which can reveal information regarding finances, staffing patterns, pupil disciplinary and drop-out incidence rates, community characteristics, and management and administrative policies, systems, and characteristics.

Through these activities, large numbers of concerns can be collected, which, when classified and documented with appropriate facts, values, and policies, and then assigned relative values of criticality, can be regarded as validated, documented, educational needs. Such needs are closely related to the problems originally felt, but are now in a refined form, complete with relevant evidence, which can be used as the basis for further planning efforts.

Generating Alternative Solutions

Defining problems and documenting, analyzing and classifying needs doesn't change the nature of an undesirable situation in any substantive way. The process has value only if the findings are used to develop and implement strategies to change the undesired situation. When problems have been thoroughly researched and translated into validated, documented educational needs, it is necessary to continue the effort by developing and exploring alternative methods by which problems might be alleviated. It is evident to most practitioners in any profession that there are seldom easy answers to complex problems, just as it is evident that there are usually multiple approaches to addressing any particular problem or need.

Generating alternative solutions serves the following purposes:

1. An opportunity is provided to a number of persons to propose strategies to meet documented needs. This increases awareness of the needs and develops a broader base of involvement and potential support to change the undesired condition.

2. Differing viewpoints about the needs can be expressed by individuals who see them from various perspectives, and consideration can be given to multiple dimensions of the problems.

3. The process of identifying multiple ways to approach a need helps to preclude premature decisions regarding the acceptance of any one strategy and helps to distinguish more clearly the *needs* from the *solutions.*

The generation of alternatives involves what has been labeled "lateral thinking" in contrast to the logical, sequential "vertical thinking" used to identify, define, and analyze problems and needs. Lateral thinking is random, divergent, and undisciplined. Anything goes, in effect, if the end product is a solution to the problem. In short, at this stage of deliberation, the solution justifies the means.

Care should be consciously exercised to avoid the following pitfalls when identifying alternatives:

- The constraints of traditional practices prevent creative thinking.
- Ideas are too often judged not on their merit but by the reputation or prestige, or lack of it, associated with the person presenting the ideas.
- Too many constraints and obstacles are considered too seriously and too soon in the exploratory process.
- The appropriate people are not involved in the process.
- The time frame within which a strategy must be identified is too brief to allow the careful consideration of alternatives.

During this stage of work, it is often valuable to contact appropriate institutions and agencies; conduct reviews of the literature; visit school districts which have experienced similar problems and have selected and implemented a particular strategy; and

employ consultants to increase awareness of alternatives which are available but which may not be known locally. It is worthwhile during this exploratory phase to expend the time and money needed to assure that a substantial effort has been made to identify alternative ways of addressing a need, for once this process is brought to a close, the specific strategy has been captured—it is now a matter of identifying it among the possibilities that have been collected.

Selecting Preferred Strategy

In most real-world situations there is a limit, often of unrealistically short duration, to the amount of time and effort which can be spent in formulating and investigating alternative solutions to any problem. The need to get on with efforts to resolve the problem situation is given impetus by forces and pressures over which those persons responsible for resolving the issue at hand have little control. These forces may include community opinion, parental demands, school board policies and decisions, student needs of an immediate and pressing nature, faculty requirements, state or federal agency demands, or any one of a number of other circumstances. Regardless of the specifics of any individual situation, the fact remains that alternatives must often be quickly analyzed so a specific strategy can be selected and implemented.

In attempting to combine care, objectivity, and precision with wisdom, insight, and experience the following should be considered:

1. Selection criteria should be defined. Some obvious criteria might include the *time* required to implement a given solution; the *cost* involved to implement; and the *estimated benefit* or *effectiveness* to be derived from the solution. Known constraints, limitations, and expectations should be clearly expressed so alternatives are evaluated in light of the realities of the situation. The degree or amount of change desired or demanded should also be well described, if possible, so alternatives can be judged in view of the expectations that exist, and the probability that any given strategy will meet that requirement can be carefully assessed.

2. The strategy accepted should have an acceptable degree of "face validity," i.e. it should be reasonably evident that the desired outcomes appear to be attainable through the solution adopted. In effect, the strategy selected should be acceptable to those who approve it; those who must implement it; and those who are involved in or affected by it. Strong negative attitudes that "it won't work" can become self-fulfilling prophecies.

3. The cost-effectiveness of the alternatives should be carefully analyzed. To do this thoroughly, it should be decided whether an *absolute* measure of progress must be attained, or whether a *relative* degree of success is adequate. To attempt to raise the reading level of *all* 4th grade pupils to the 4th grade level might require an investment of $80,000; however, to raise the reading level of 85% of the pupils to that level might cost only $50,000. The probability of total success, availability of adequate resources, and personal and societal values all have to be recognized and dealt with in such decisions. The application of cost/benefit and cost/effectiveness analyses are often less appropriate and less conclusive in educational activities, however, than in the business/industrial sector where such processes are routinely used with a high degree of confidence. In many cases in education it is not a question of *whether* a particular effort should be made, e.g. providing for education of the mentally handicapped, but rather *how* this can best be done. Few *absolute* measures of success can be deemed appropriate. Instead, relative measures of gain and improvement are most often employed and lack of success means only that another approach must be tried — the task cannot be abandoned because of failure to meet expected goals.

4. The perfect solution to persistent, complex problems is unlikely to be found. While new techniques, materials, and procedures have been developed in many areas of education and have resulted in improved instructional and related services for today's students, many familiar problems of motivation, ability, interpersonal relationships, attitudes and values, and physical and mental handicaps still remain and must be addressed anew with every generation of students. Realistic results rather than overly optimistic expectations should be stressed to avoid unnecessary disappointment and disillusionment with the strategies that are implemented and the possible termination of programs and activities that are positive, even if they are not perfect in their impact.

Implementing Selected Solution

Needs have been identified, documented, and validated; alternative strategies have been generated; and a preferred solution has been selected from the available options. Although this process

may not have been as rapid, thorough, and systematic as in textbook planning models, it has probably resulted in a chosen course of action. So far, however, little if anything has changed in the need or problem area. If these previous steps have been done well, however, a reasonably smooth transition should be experienced in implementing the chosen solution. If the implementation phase is poorly done, it can negate all the time and effort carefully spent in arriving at this point. To avoid that situation, the following areas should be considered in the implementation planning:

1. Are the available financial resources adequate to support the new efforts to a degree that will make success probable, or at least that will not cause inadequate funding to be the cause of failure? Unusual, one-time start-up costs should be recognized and provided for as needed, and continuing full-fiscal-impact data should be available and understood.

2. Is it clear who will have specific implementation responsibilities, and whether the authority will be commensurate with the designated responsibilities? Do all those who are likely to be affected by or involved in the new endeavor know who is responsible for what, and which specific duties and tasks they are expected to perform?

3. Are staff members well-informed regarding the strategy selected, and can they explain and interpret it adequately to others? Has specialized training been provided to those who will need it to participate effectively in the implementation work? Has the community been informed of the dimensions and directions of the new efforts, and the needs and resources related to the chosen strategy?

4. Will new personnel be employed to implement the selected solution? Are qualified people currently available? If existing staff are responsible for implementation will this work be added on to existing duties, or will there be a formal and clear reduction of other work so the new efforts don't suffer because of a lack of time and attention from people who already have other full-time responsibilities?

5. If appropriate, have the physical needs of the new strategy been attended to? Is adequate space available in an acceptable location? Will new equipment, materials and supplies be needed? Are they budgeted for? Are they ordered? Have they arrived? Is secretarial/clerical assistance needed? If so, who will provide it?

6. Has an evaluation strategy been developed? How will it be known if reasonable success is attained? What will be the indicators of success? Who will judge the success or failure of the implementation? When will this occur? How much time and money will be invested before satisfactory results must be shown? If the evaluation strategy is product-oriented, what will be the product(s) that signal attainment of the objectives?

7. If students are directly involved in the implementation, have they been selected and/or prepared for their participation? Must records, data, materials, etc. regarding pupils be gathered, collected, analyzed, and interpreted before the implementation begins? Should parents be informed of new activities/programs affecting their children?

Not all of these questions are appropriate for all new strategies and programs. Conversely, some additional questions will probably be needed to accurately reflect any given situation. The point, however, is that such questions should be asked and answered as fully as possible to provide the best possible opportunity for the new efforts to be successful. Unexpected problems, constraints, and forces may never be totally eliminated, but the probability of such difficulties can be reduced and their effect minimized through careful analysis of the implementation phase.

Evaluation and Revision of Implemented Program/ Policies

Few human endeavors are so perfectly planned and implemented that there is no need of revision and improvement. It is to be expected that new programs, processes, and procedures may experience imperfections of many types, and that continuous monitoring, evaluation, and modification will be necessary to attain and maintain an acceptably high level of performance.

Several important considerations in this respect are as follows:

1. To the fullest extent possible, the performance standards or criteria to be applied during evaluation should be selected and agreed upon prior to implementation, and all appropriate parties should know and understand the measures to be used in judging success or failure.

2. The processes, procedures, time periods, and means (such as tests, written instruments, etc.) by which evaluation will occur should be decided upon as early as is practical, but should not be so rigid and insensitive to new conditions that the procedure cannot be amended in light of new developments and unanticipated circumstances.

3. If the newly implemented program is sufficient in size and importance to warrant the extra cost and time involved, it may be appropriate to employ outside evaluators who can presumably give more objective, less biased analyses of the program than those intimately involved in its conception and implementation.

4. Evaluation should be reviewed as a positive, healthy indication of organizational strength, not as a threatening, negative activity which causes individual and collective defensiveness to appear. The most valuable critical evaluations can often be provided by those persons most knowledgeable about, and involved in, the implementation on a day-to-day basis. Opportunity should be provided for such persons to make their judgments and perceptions known in advance of or in conjunction with other personnel who may be evaluating the new efforts.

5. Evaluations should, if possible, be a combination of objective and subjective data. In spite of the scientific approach to educational evaluation advocated by many measurement experts, it is often difficult to "prove" that success or failure has occurred on the basis of statistical tests or other mathematical data. Conversely, it is often inadequate to claim success or failure based on perceptions, attitudes, and values which are totally devoid of objective evidence. A combination of hard data, professional judgment, experienced insights, and relevant values must be brought together in a balanced manner to assure that an adequate evaluation has taken place.

Evaluation should result in program improvement. New activities which become prematurely "locked in" to the original implementation processes, procedures, and policies negate the beneficial effects of sound evaluation and tend to promote defensiveness of the original decisions rather than encouraging positive change.

VIII. Summary And Conclusion

Educational planning is both an art and a science and probably will continue to be in view of the characteristics and expectations of the public educational system. While this means that planning can never be reduced to mathematical certainty, it does not mean that planning is a waste of time and effort because the variables are too numerous or their interrelationships too complex. The alternative to planning is not to plan and no school district has ever endorsed or practiced that philosophy and continued its existence. The larger question is the degree or extent of planning that will occur, and the means by which it will occur.

The following thoughts are offered for consideration:

1. Local school personnel should analyze and evaluate the means by which they currently plan their district's educational future. A critical self-appraisal of existing planning processes may reveal deficiencies which should be corrected as well as strengths which should be recognized.

2. Consideration should be given to developing and/or formalizing a planning capability within the district. While many districts may not have resources immediately available to employ a planning coordinator, the concept and philosophy of planning can be developed and instilled in the district if someone on the staff is charged with planning responsibilities. To do this in a serious manner requires a formal release from other current duties, at least on a part-time basis or inevitably the pre-existing responsibilities and demands will reassert themselves and the planning function will exist only in intent and not in practice.

3. The feasibility of providing planning services and personnel through inter-district arrangements or through the CESAs should be explored. While every district is unique to some degree, there are also many areas of common need and concern which could be addressed on a cooperative basis with a greater economy of scale. Federal and state legislation often imposes similar requirements on local districts (Chapter 89-Handicapped Education, and Chapter 90-School District Standards are recent examples) which should not have to be dealt with in isolation by over 430 local districts.

4. Planning efforts during the past decade were often directed toward managing additional resources and providing for an expanding enrollment. A declining statewide pupil population; continuing demands for accountability and increased productivity; stabilizing budgets; new curricular/instructional needs; and increased state level involvement are placing new and different demands upon local school districts. Planning priorities and strategies will have to be developed and/or adjusted to deal effectively with these changing conditions.

5. Except in isolated cases and limited areas the 25 year effort to bring about a significant reduction in the number of local school districts appears to be diminishing rapidly. For the first time in several decades it is possible to predict, barring severe unforeseen circumstances, that the present local administrative units which now exist in Wisconsin will be basically unchanged in number for the next decade or more. What exists in the mid-1970s may basically be the same in the 1980s and improvements in the educational system will probably have to come from within existing units, not as the result of dramatic changes brought about by the consolidation of local districts. Improved planning capabilities, although not a panacea guaranteed to resolve all problems and needs, is an essential ingredient which can contribute to the further growth, development and improvement of the public educational system.

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